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**US 2003/0229529 A1**

patent application

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**Filing Date**

2001-02-23

**Publication Date**

2003-12-11

**Application Number**

09792624

**IPC**

G06F\_017/60

**US Classification**

705/008000

**Title**

Method for enterprise workforce planning

**Claims**

1. A computer implemented method for identifying one or more persons from a plurality of persons to utilize in achieving a goal, the method comprising: establishing a plurality of competency records, wherein each competency record represents a competency; establishing a plurality of person records, wherein each person record represents a person available to utilize in achieving a goal and identifies competencies held by said person and associated held competency levels by said person; building a desired goal profile record representing a desired goal to be achieved, wherein said goal profile record identifies competencies and associated competency levels helpful in achieving the desired goal; comparing said identified competencies and associated competency levels in the goal record to the competencies and associated competency levels in all the person records to generate a list of matching persons.
2. The method of claim 1, wherein said step of comparing said identified competencies and associated competency levels in the goal record to the competencies and associated competency levels in all the person records comprises: (a) if a competency identified in the goal profile appears as a held competency in a person record and if the required competency level in the goal profile is greater than the held competency level, determining the difference between the competency level identified in the goal profile and the held competency level and multiplying the difference by a criticality factor; (b) if a competency identified in the goal profile does not appear a held competency in the person record, multiplying the required competency level by a criticality factor; (c) repeating steps (a) and (b) for each competency identified in the goal profile and summing the results to produce a total distance value for the person record; and (d) repeating steps (a) through (c) for each person record to generate a total distance value for each person record.
3. The method of claim 2, further comprising: calculating a total criticality weight by multiplying for each required competency in a goal profile the required competency level by a corresponding criticality factor and summing the results; dividing the total distance value for each person record by the total criticality weight to view the total distance value for each person record in terms of proportion.
4. The method of claim 1, wherein said goal profile record identifies a criticality factor for each competency to indicate the relative importance of each competency to the desired goal.
5. The method of claim 4, wherein said criticality factor is determined by a manager of an organization responsible for goal setting.
6. The method of claim 1, wherein said identified competencies and associated competency levels are determined by a manager of an organization responsible for goal setting.
7. The method of claim 1, wherein the goal profile record is associated with a subgoal profile record or parent goal record, and each subgoal or parent record may have additional levels of subgoals or parents, and each subgoal record or parent goal record identifies competencies and associated competency levels helpful in achieving the desired subgoal or parent goal;
8. The method of claim 7, further comprising generating a list of competencies and associated competency levels identified by a desired goal and all of the desired goal subgoals, wherein said list of competencies and associated competency levels is compared to the competencies and associated competency levels in all the person data records in the persons database to generate a list of matching persons.
9. The method of claim 1, wherein the list of matching persons is displayed to a user via a display terminal.
10. The method of claim 9, wherein a user selects a person from the list of persons and attaches the desired goal to the person data record of said person.
11. The method of claim 10, wherein said held competency level by a person is determined from evaluations such as personal assessments, test, and courses.
12. The method of claim 11, wherein said competency level is calculated using a weighted average of available evaluations.
13. The method of claim 12, wherein said person data record identifies the most current available competency level as the competency level is recalculated each time a new evaluation is available.

14. The method of claim 1, wherein said competency data record contains fields for the competency name, competency description, and held competency level requirements.
15. The method of claim 1, further comprising establishing a person competency profile record associated with each person data record, the person competency profile record comprising fields for held competency, held competency level, and prior evaluations used in determining the held competency level.
16. The method of claim 1, wherein said goal profile record further comprises a goal metric, goal type, goal category, and goal unit
17. A computer implemented method for identifying needed workforce training comprising: establishing a plurality of competency records, wherein each competency record represents a competency and identifies learning material associated with the competency; establishing a plurality of person records, wherein each person record represents a person available to utilize in achieving a goal and identifies competencies held by said person and associated held competency levels by said person; identifying one or more required competencies and associated required competency level for a person, wherein each required competency is assigned a criticality factor to indicate the relative importance of each required competency; retrieving for a person the held competencies and associated held competency level and determining for the person the difference in required competency level and held competency level for each required competency; adjusting the difference in required competency level and held competency level for each required competency using the criticality factor to determine the relative importance of each difference; and presenting to the user the adjusted difference in required competency level and held competency level for each required competency to enable the user to identify the required competency for which the need for training is greatest.
18. The method of claim 17, further comprising assigning a person a goal profile record representing a desired goal to be achieved, wherein said goal profile record identifies required competencies and associated required competency levels.
19. The method of claim 17, further comprising assigning a person a job position profile record representing the person's job position, wherein said job position profile record identifies required competencies and associated required competency levels.
20. The method of claim 17, wherein said goal profile record is associated with a subgoal, wherein said goal profile and subgoal together identify the required competencies and associated required competency levels.
21. The method of claim 17, wherein said held competency level by a person is determined from evaluations such as personal assessments, tests, and courses.
22. The method of claim 17, wherein said competency level is calculated using a weighted average of available evaluations.
23. The method of claim 17, wherein said person data record identifies the most current available competency level as the competency level is recalculated each time a new evaluation becomes available.
24. The method of claim 17, wherein said learning material comprises courses.
25. The method of claim 17, further comprising retrieving the learning material for each required competency and presenting the learning material for a competency to the user when the required competency level is greater than the held competency level.
26. The method of claim 20, wherein said goal profile record further comprises a goal metric, goal type, goal category, and goal unit.

#### **Abstract**

The present invention provides a solution to the needs described above through a method for identifying one or more persons from a plurality of persons to utilize in achieving a goal. The method comprises establishing competency records, person records, and building desired goal profile records. Competencies identified in person records are compared to required competencies identified in goal profile records to identify best fit persons to utilize in achieving a goal.

#### **Related Applications**

2000, both of which are incorporated by reference herein in their entirety.

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